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Maximize your Investment: Building a Portal to Your SAS® Resources

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ABSTRACT

Most SAS users are unaware of the wealth of resources that are available to them. These include a variety of sources, from internal to their own organization to SAS itself. Help your users get the most out of the investment that has been made by giving them quick, relevant, and intuitive access to these resources. This paper shows you simple yet powerful ways to connect SAS users to the resources that will help them get their jobs done and maybe even accomplish things they did not think possible. We will explore traditional methodologies, as well as social media techniques to make these connections.

INTRODUCTION

When you license SAS, you might not be aware of the wealth of support services that come along with the software. The purpose of this paper is not to give you the details of those – there are other papers and resources that do that – but instead help you improve your access to those services for yourself and those whom you support. Throughout this paper, we look at gradually increasing levels of “connectedness” to those services. We begin with a baseline perspective by identifying the resources available and following through to developing a true internal SAS support community. Between these two, there is often an intermediate step of creating a static internal support site to surface links to these resources. However, because the techniques to accomplish this are well known, we will not address that in detail.

OVERVIEW OF SAS SUPPORT

As an individual user, the first step is to identify and define all the support resources that are available and relevant to your job. Let's use this section to get an overview of all the support services that are available to you. We also provide some details about making the relevant resources available in an accessible way. Let's spend a few minutes looking at these resources and the links that you might want to track.

Education

Education is one of the keys to receiving the maximum value from SAS software and should be viewed as a journey rather than a destination. SAS Education has many resources to help you in that journey including a re-designed Website, along with individuals who are available to help you plan your path forward. You might want to bookmark the primary Training site off of support.sas.com by linking to <http://support.sas.com/training>. If you are not familiar with SAS or not sure where to start, begin by creating your own “training path” using the guided learning path creator located on the main page. This is also a good time to mention the importance of creating a SAS profile. This profile will help you keep track of your support activity and maximize your experience while using support.sas.com. Remember, you can also talk directly with an Education representative if you have questions. Representatives can be reached by phone at 800-333-7660 or by e-mail at training@sas.com. If you are not a U.S. customer, use the Worldwide Training list at the top of the main page to locate resources in your area.

Publications

SAS Publications offer a number of resources including product documentation and SAS Press titles. These offerings will help you get the most out of the products you have. They can also extend your horizons by exploring topics you are interested in on a much deeper level. Most product documentation is available for free in HTML and in printable PDF format from support.sas.com at <http://support.sas.com/documentation/>. Hard-copy manuals are also available for purchase through the SAS Publishing bookstore at <http://support.sas.com/publishing>. Also found here are SAS Press titles. These are user-written books that provide unique insight on the use of SAS and how users from around the world are applying SAS software to solve specific business issues.

Technical Support

SAS Technical Support has over 350 consultants worldwide who are available to assist you with issues and questions via e-mail or phone support. With an average tenure of over 10 years at SAS, they are skilled at helping to resolve your issues quickly. Much of what they learn in these daily interactions goes into a knowledge base that is made available, enabling you to find answers to many questions that have been asked before. Searching this knowledge base can speed your time to answer, as well as give you additional information about topics of interest. You can find Samples and SAS notes from Technical Support here <http://support.sas.com/rkb/>. Or, if you are unable to find your answer, submit a problem here <http://support.sas.com/ctx/supportform//createForm>. Remember, you can always call the award-winning support technicians at 919-677-8008 in North America, or call your local SAS office outside of North America.

Customer Loyalty

In the U.S., Customer Loyalty is a team that is dedicated to helping you get the most out of your software investment. Customer Account Executives can help you navigate a wealth of resources at SAS as well as provide you and your organization with other innovative programs to increase your knowledge and skills. As this is a relatively new organization at SAS, let's review some of the services they offer.

- SAS Days – half- or full-day events to teach ways to optimize SAS usage, discover new capabilities, share feedback, and network
- Lunch and Learn Sessions – one-hour presentations that showcase an area of technology specific to your organization's needs
- Webinars – Regularly scheduled WebEx sessions for more exposure to SAS Software
- In-House Users Groups – an opportunity to connect with your entire organization at one location (or multiple locations) to share confidential topics and use actual data in discussions to foster an environment of growth, development, and education
- Value assessments – an opportunity for SAS to spend time talking with appropriate individuals in your organization, looking at data and business flow to document the value being received from your SAS investment, or help plan a path forward to ensure that value is being received

You can contact Customer Loyalty by calling 800-727-0025 or sending e-mail to customerloyalty@sas.com. Outside of the U.S., check with your country office to determine if similar offerings are available in your location.

support.sas.com

All the information we have covered so far is available through support.sas.com directly. If you have not visited the site in a while, there have been a lot of updates including a new homepage, navigation, and improved search capabilities. Be sure and take advantage of RSS feeds available from SAS. RSS feeds

can be a great content resource for your portal. Go to <http://support.sas.com/community/rss> to learn about all the feeds that are available.

sasCommunity.org

Become part of a global community of SAS users. Much of what we discuss in the next section deals with building a vibrant, internal SAS support community. If your organization is not ready from a resource or infrastructure perspective to build a site like this, sasCommunity.org is an ideal location to incorporate many of the same ideas. See what is available to you at <http://www.sascommunity.org>. Also be sure to follow sasCommunity.org on Twitter. You can find this link on the sasCommunity main page.

BUILDING A SAS PORTAL

Traditionally, the next step is to create a static Website for your internal SAS users and surface all the material that you have built up over time, making it easier for you to support them with a minimal amount of effort. I will skip over this stage in this paper. Our customers have been doing this type of thing for years and, once they know what resources are available and how best to access them, have little difficulty making that content available through a static Website. I will spend the remainder of the paper exploring the possibilities of moving to a new way of surfacing content and fostering collaboration.

Let's talk about creating an interactive, social community that is not only supported by you, but more importantly, by everyone who is a part of it. In order to accomplish this, you can create a community using a tool like Microsoft® SharePoint®. In doing the research for this paper, I was able to observe a great example of this type of community on the SharePoint site for one of our customers, Citi®. First, I would like to thank Stefanie Reay for taking the time to go over the Citi internal SharePoint site and sharing what they have learned in implementing it. They have over 200 global members currently participating, so she has received a lot of input and feedback. One reason that Citi created the site was to help a growing number of new SAS users. This situation is not unique to Citi. As SAS expands into new areas of your business, you might have many users who are new to SAS and might use it only occasionally. Those users typically will not have the time to research questions, and they might be unfamiliar with the support services available to them. A site such as the one created by Citi will support the occasional user as well as enable the more sophisticated SAS user to contribute to a vibrant community. Much of what we discuss is available in Microsoft SharePoint 2010 or, as in the case of the Citi example, an earlier version of SharePoint using a third-party add-on such as Newsgator™ to provide more of the social components.

PLAN YOUR SITE

How do you move forward with creating a social site like this? The key to setting up a solid Portal site is to spend sufficient time defining and creating your metadata. This will fundamentally drive the success of the site going forward and is crucial for its success. Some examples of metadata include categorizing information by product, solution, work group, task, or persona. The taxonomy you create, if done correctly to begin with, will allow your site to change and grow as your organization grows over time. By spending a little extra time here, you can maximize the exposure of all new content as it is added, either by both you or by others. What about that content? Earlier in the paper, we discussed the general categories of content that need to be tagged using the metadata structure you have created, but what new content might this SharePoint environment allow us to take advantage of? I will focus on this in the final portion of the paper, but first, let's look at the next major step in the process.

BUILD YOUR SITE STRUCTURE

Once metadata is defined, the next area to focus on is the actual structure of the site. Citi, for example, builds its top level segmentation starting with products. So those using Base SAS 9.1.3 on Solaris would have a central place to start their inquiry. This enabled Citi to surface relevant information around software hotfixes, upgrade information, usage tips and tricks as well as set the framework for social interaction and the sharing of best practices. The key is to structure the site in a way that simplifies initial access. Once they begin using the site, users are provided a wide community of resources that they can use to broaden their view and usage of the software. A quick answer can turn into a deeper understanding or the discovery of a best practice from a colleague. This organizational structure is going to vary by business need. Be open and creative and look for a structure that fits your organization and its users. For example, as mentioned earlier, Citi starts with product, SAS starts with industry, and your organization might start with site location or department. An important point to realize is that if your metadata is set up correctly, your structure can change over time. It is much easier to change the view into the content than it is to change the metadata driving the linkage to the content.

ADD COLLABORATION

Now that you have the beginnings of a SAS support portal, what are some of the new features of this type of environment that make it so powerful, and how can you take advantage of them? Two features bring a tremendous impact to the site's content:

- the ability for members to rate content as well as create discussions directly associated with that content. Community members' ability to rate material has a "survival of the fittest" effect on content, moving the most relevant and valuable information to the top and allowing the rest to fall off. This capability brings the best of social interaction to bear on the content and shifts the burden of determining whether content is relevant from the individual to the community. The benefits include better content, greater participation because of the quality of the content, and less upfront effort from individuals trying to determine content relevance.
- the ability to comment on or start a discussion around each piece of content. What feedback do other colleagues have on the content? What has worked, not worked or what adjustments have they tried? So much insight can be provided by giving others in the community the opportunity to share their knowledge, experience, and unique perspective.

ENABLE CONTENT NOTIFICATION

The ability for community members to set alerts on content or topics is a key to keeping the user community informed and empowered. A great example of this is seen in the Citi portal's management of technical notes, upgrades, and hotfixes. Since they structured the site around products, as community members set alerts on the products relevant to them, they are automatically notified of any changes or updates. This streamlines communication to the more than 200 users throughout the globe. These alerts can also be set to update when communities of interest are updated. Is there a team of users who are tasked with building the best statistical models to forecast sales? Interested users can set alerts to monitor their discussions (if open) and get updates if any changes are made to practices of interest.

ENABLE CUSTOMIZATION

One of the most powerful features in this type of environment enables users to set up their own My Site. A My Site is central point for users to manage all their links, libraries, topics, and even content contributors that are most relevant to them and their use of SAS. By actively filtering and surfacing

meaningful content, the full value of the site is realized. Of course, all the content is still available when needed and easily found either using structural navigation or search techniques. My Site also provides the ability for users to share information about themselves including their interests and expertise, making that available to others in the community and fostering greater collaboration.

ADVANCED FEATURES

What's next? Take advantage of the next wave in collaboration by incorporating content from other sites including social media. For example, you might allow your community members to blog, or consider incorporating Web parts for other social media such as Twitter and LinkedIn or use RSS feeds to bring in content from external sources like support.sas.com, sasCommunity.org or blogs.sas.com. These enable users to keep-up-to-date on the thought leaders who provide the most value to them as well as get almost instant updates.

CONCLUSION

To help your users get the most out of the software they use, help them get connected to the services that can support them. How tightly they are connected to these services can have a direct impact on their productivity. Simply making them aware of the services and giving them the common links is a big step in the right direction. If you have the resources and the corporate commitment, creating a vibrant, collaborative social community portal to these resources can bring amazing results and truly help all SAS users maximize the value that they receive from their SAS Software.

CONTACT INFORMATION

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